Processing a Purchase Order for Group Training in CHRIS

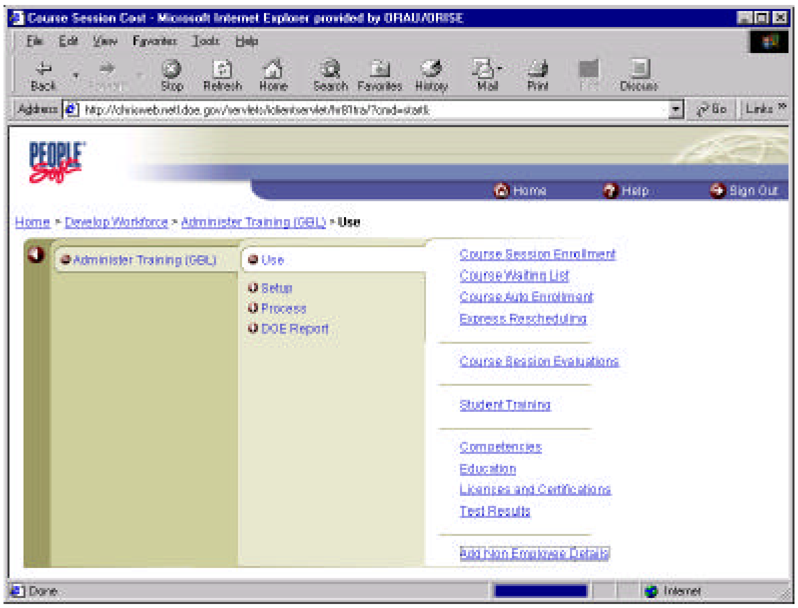
An SF-182 can be used as a Purchase Order for obtaining group training from an outside vendor without processing it under the name of an employee. The process is acceptable to the Capital Accounting Center, however you should discuss it with your finance office to obtain their approval prior to utilizing it.

The ***first*** time you wish to utilize this process you must establish a Non-employee record which will be used for all future processing of group training.

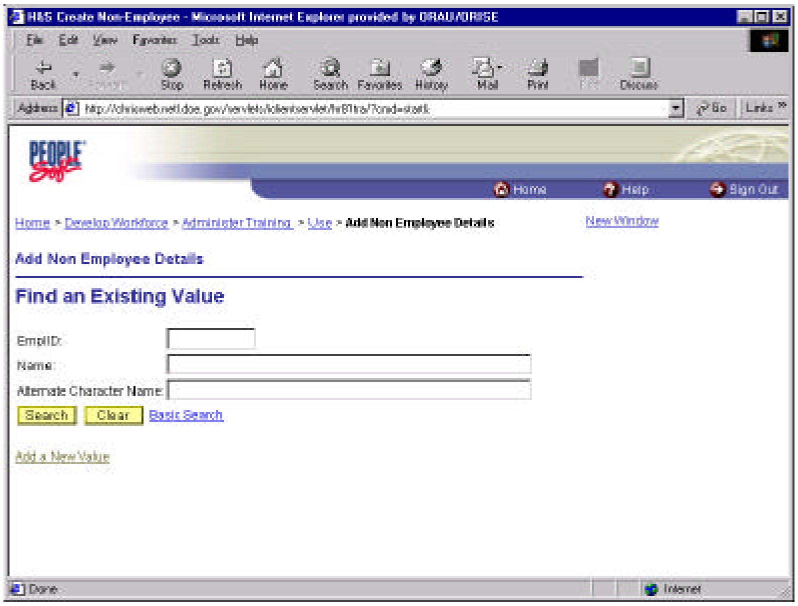
Navigate to the "Administer Training (GBL)" screen.

1. Click on "Use."

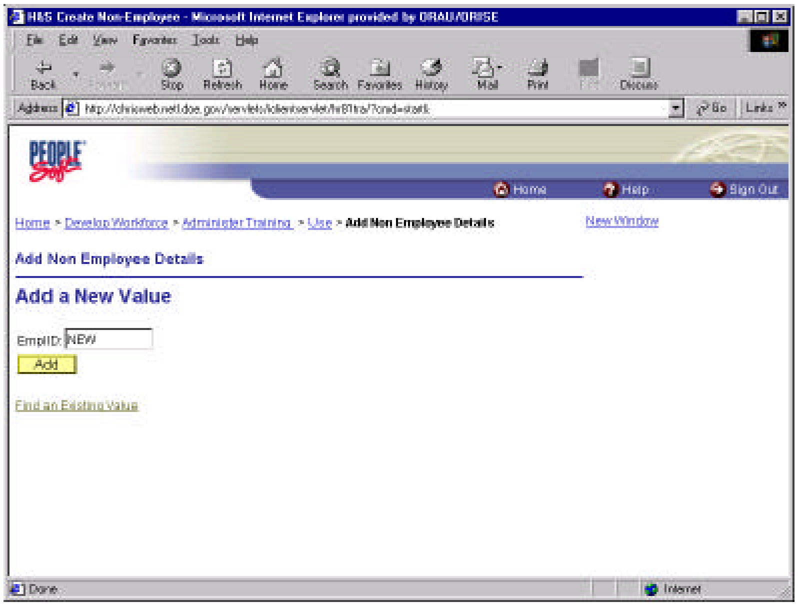
2. Click on "Add Non Employee Details."



The "Add Non Employee Details" screen is displayed.

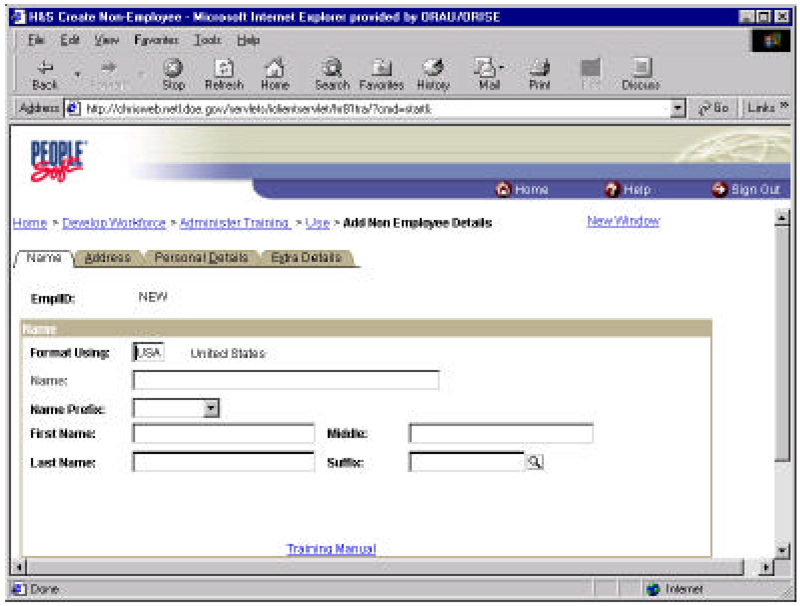


3. Click on "Add a New Value."



The "Add Non Employee Details" "Add a New Value" screen is displayed with "New" in the "EmplID" field.

4. Click the "Add" button.

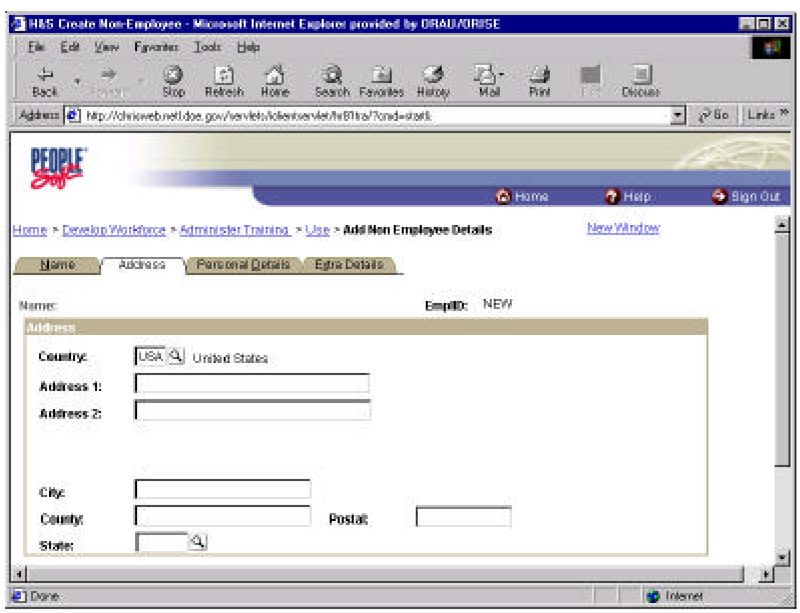


The "Add Non Employee Details" screen is displayed.

5. Enter your office in the Name fields (Ex: First Name: Rocky, Middle: Flats Field, Last Name: Office).

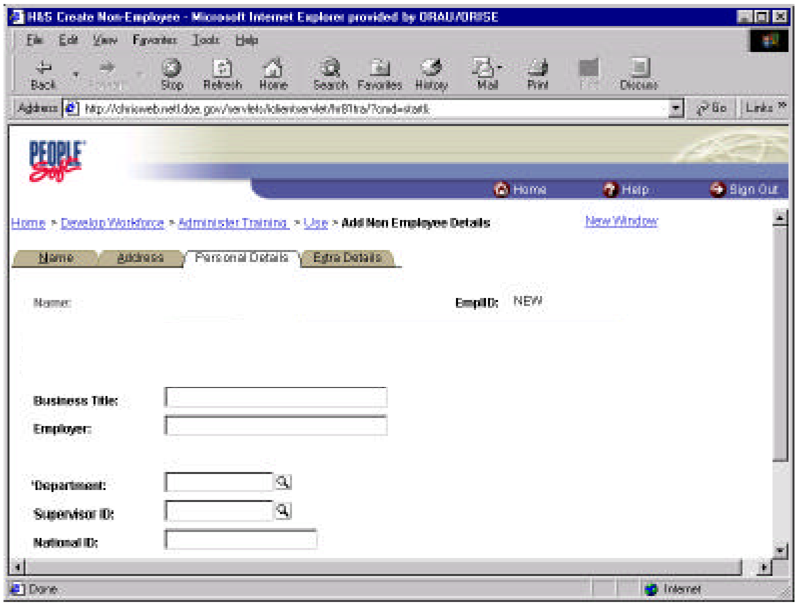
6. Click on the "Address" tab.

The "Address" screen is displayed.



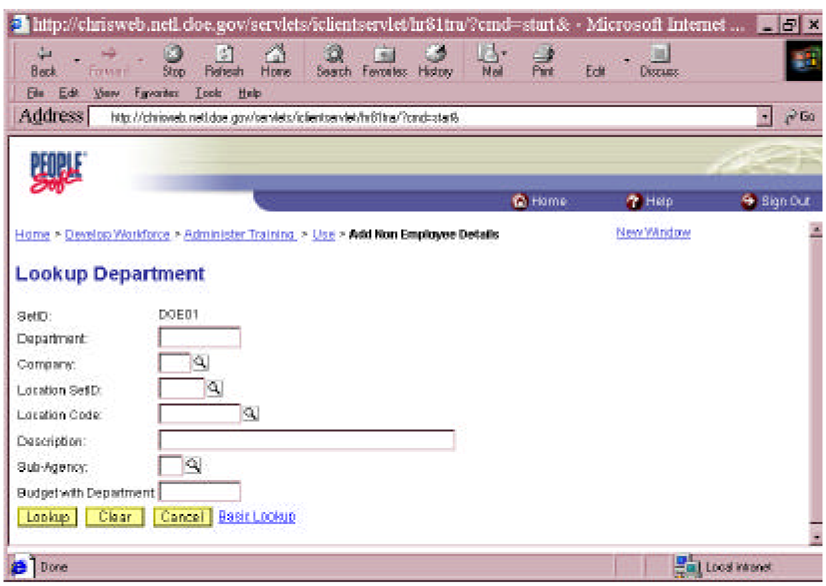
7. Enter the address.

8. Click on the "Personal Details" tab.



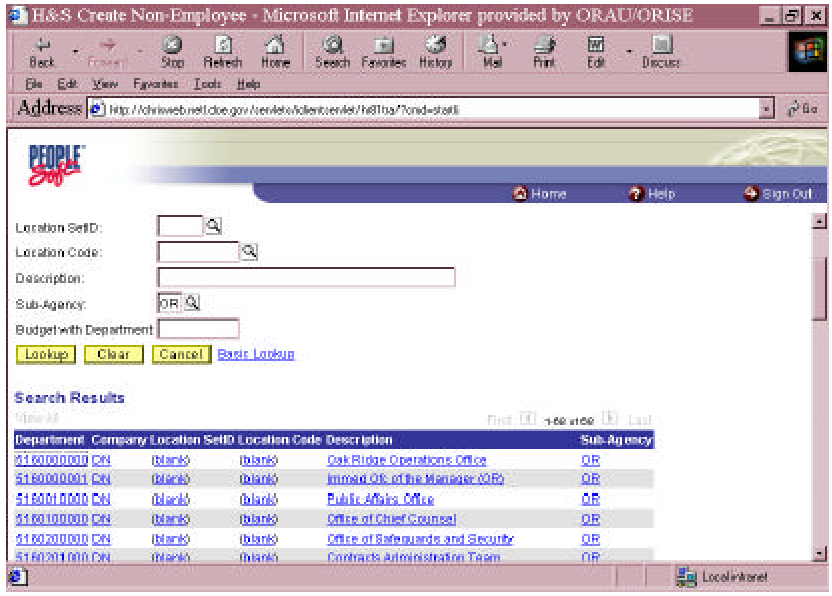
9. Enter the department in the "Department" field or click the magnifying glass to search if unknown.

The "Lookup Department" screen is displayed.



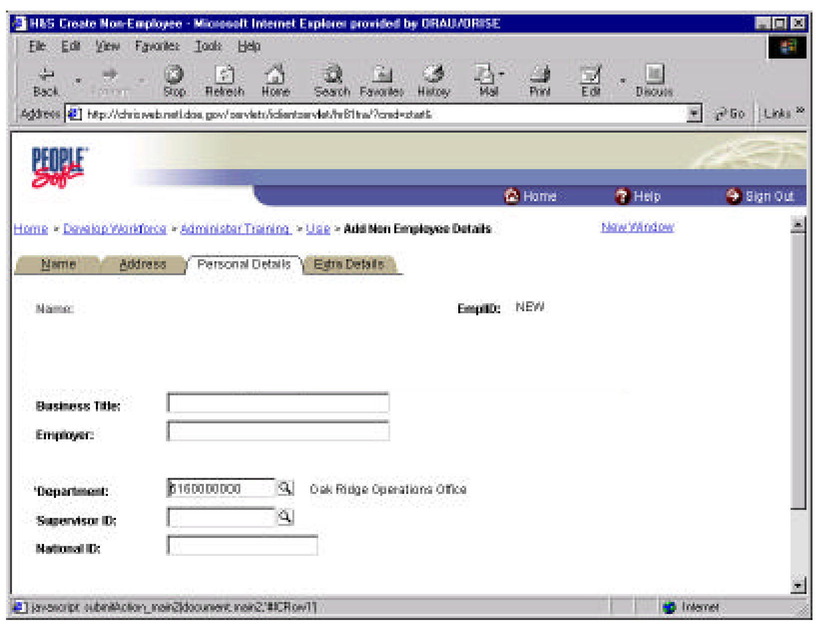
10. Enter your two letter Sub-Agency code i.e., AL, CH, etc. and click the "Lookup" button.

The "Search Results" display all Departments within your Sub-Agency.



11. Click on the Department you desire.

The "Add Non Employee Details" screen is displayed with the department code entered in the "Department" field.



12. Enter your employee ID in the "Supervisor ID" field.

13. Click Save.

14. Write down the non-employee number (N#####) generated by CHRIS in the "EmplID" field.

15. Click on "Use" from the bread crumb menu.

16. Click on "Add Non Employee Details."

17. Enter the non-employee number generated in step 14 above in the "EmplID" field and click on "Search".

18. Select the "Personal Details" tab.

19. Convert the non-employee number and enter it into the "National ID" field by deleting the "N" prefix and adding four zeroes to the right of the number, i.e. N12345 becomes 123450000.

20. Click on "Extra Details" tab if you wish to enter additional address information.

21. Click on "Save."

From Student Training generate the SF-182. Use the full non-employee ID number generated in Step 14.

DOE Reports

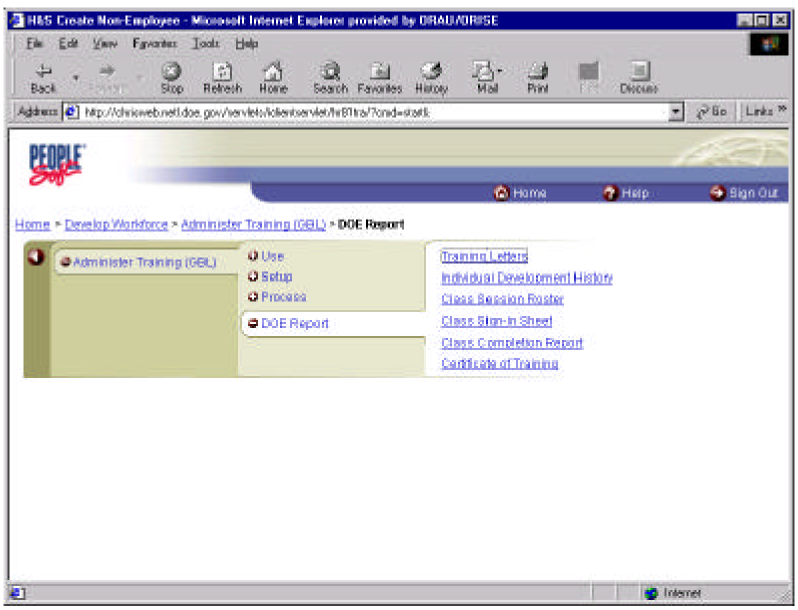
Standard reports are generated automatically from the CHRIS system. Reports can be generated for:

- Training Letters
- Individual Development History
- Class Session Roster
- Class Sign-in Sheet
- Class Completion Report
- Certificate of Training

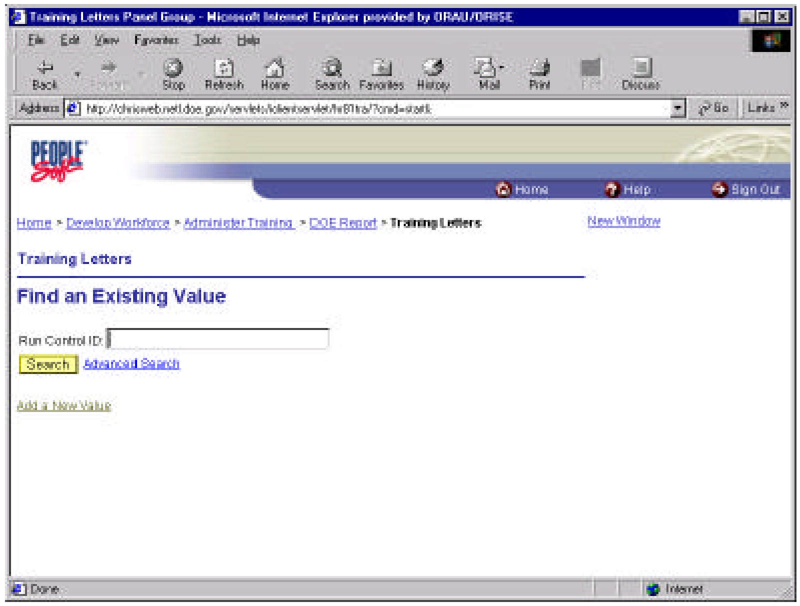
Training Letters - Printing

To print out one of the Training Letters:

1. Click on "Administer Training (GBL)."
2. Click on "DOE Report."
3. Click on "Training Letters."



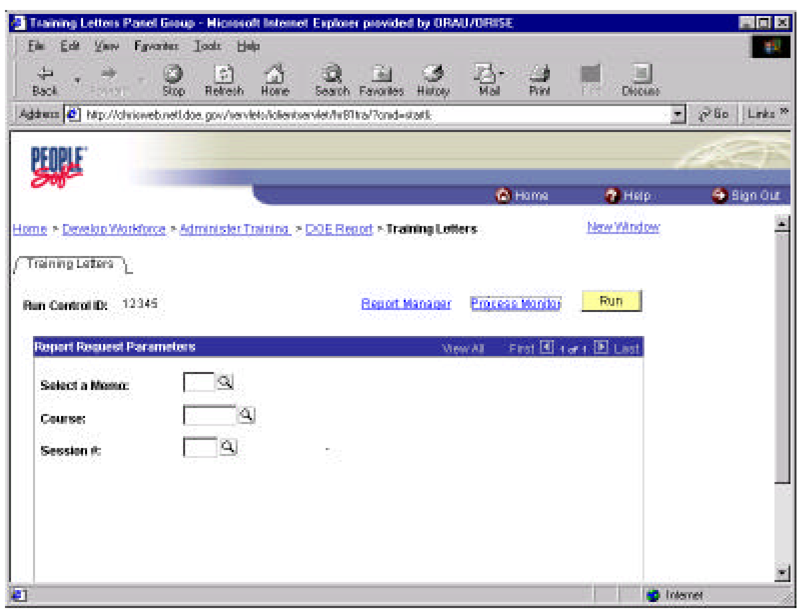
The "Training Letters" "Find an Existing Value" screen is displayed.



4. Enter your CHRIS user ID in the "Run Control ID" field.

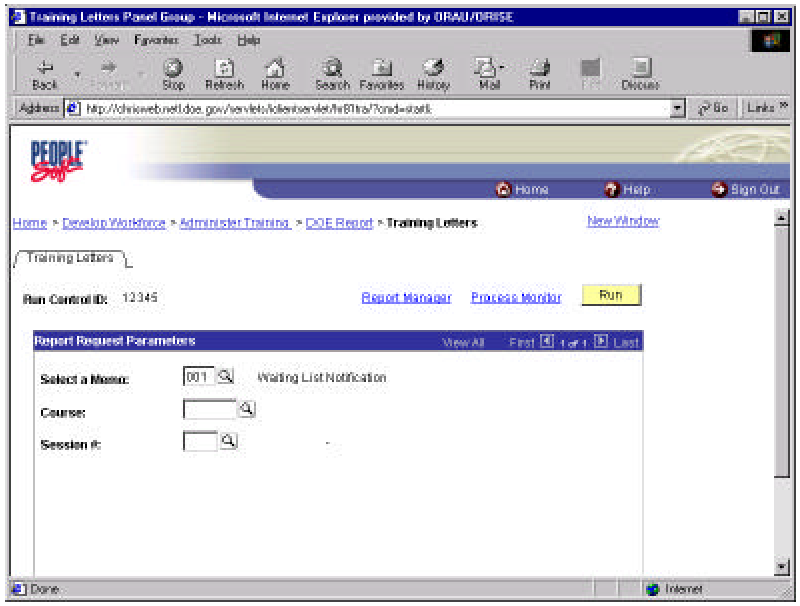
Note: If you get a "No Matching Values Were Found" message, click "Add a New Value," reenter your CHRIS user ID.

The "Training Letters" screen is displayed.



5. Enter the letter number in the "Select a Memo" field or click on the magnifying glass to search.

Note: If the letter number is not known, click on the magnifying glass to the right of the "Select a Memo" field. The Lookup Select a Memo screen is displayed. Click the "Lookup" button and select a "Letter Code" from the "Search" results.

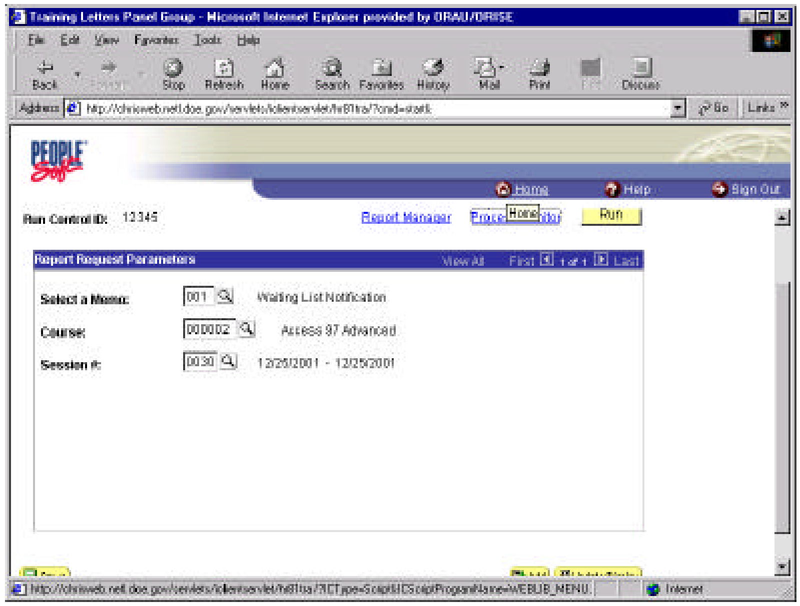


The letter code is placed in the "Select a Memo" field.

6. Tab to the "Course" field and enter the course number.

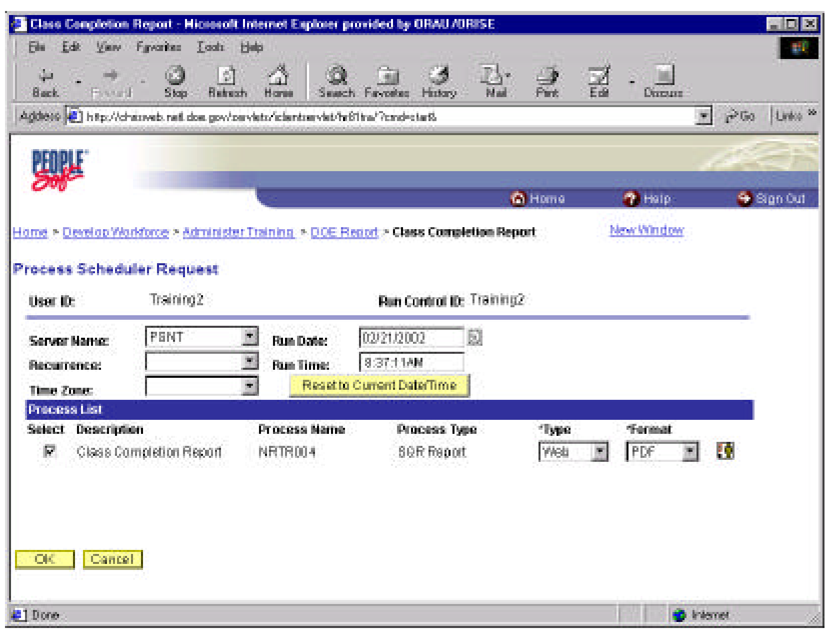
7. Tab to the "Session #" field and enter the session number. (Use the magnifying glass to search if the numbers are not known.)

The course number and session number are displayed in the appropriate field.

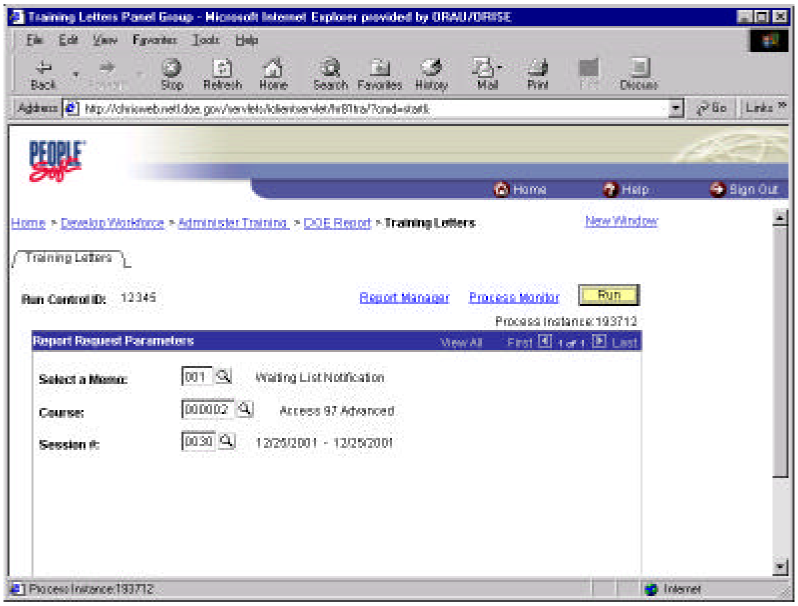


8. Click the "Run" button.

The "Process Scheduler Request" screen is displayed. Verify that the "Server Name" is PSNT, the "Type" is Web, and the format is PDF.



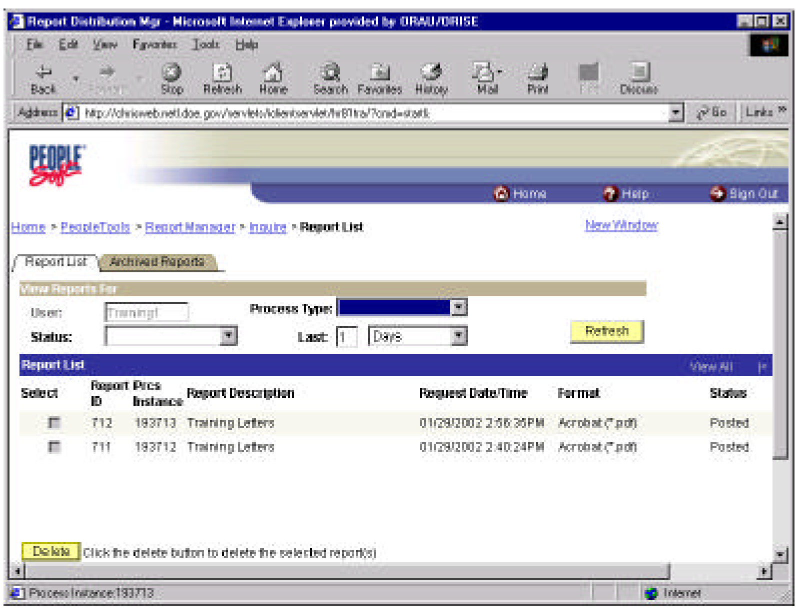
9. Click the "OK" button.



The "Training Letters" "Report Request Parameters" screen is displayed.

10. Record the "Process Instance" number displayed just below the "Run" button.

11. Click on the "Report Manager" link.



The "Report List" screen is displayed.

12. Locate the Process Instance that is the same as the one recorded in step 11. Ensure that the Status is "Posted" – if it is not, click the Refresh button until it is - then click the "View" link on the far right.

13. Click the link for the output file ending in .pdf. View the SF-182 in a new window and print if the results are correct.

    Note: You will need to have Adobe Acrobat Reader version 5.0 or later to align the print out of the SF-182 to be in the center of the page. You simply click on the Print icon on the tool bar of the Acrobat Reader and you will get a secondary page that shows the Print page setup information where you will need to uncheck the boxes labeled: "Shrink oversized pages to paper size"; "Expand small pages to paper size"; and the third checkbox labeled "Auto-rotate and center pages"-all three of these boxes MUST be unchecked in order for the SF-182 to print correctly on the page.

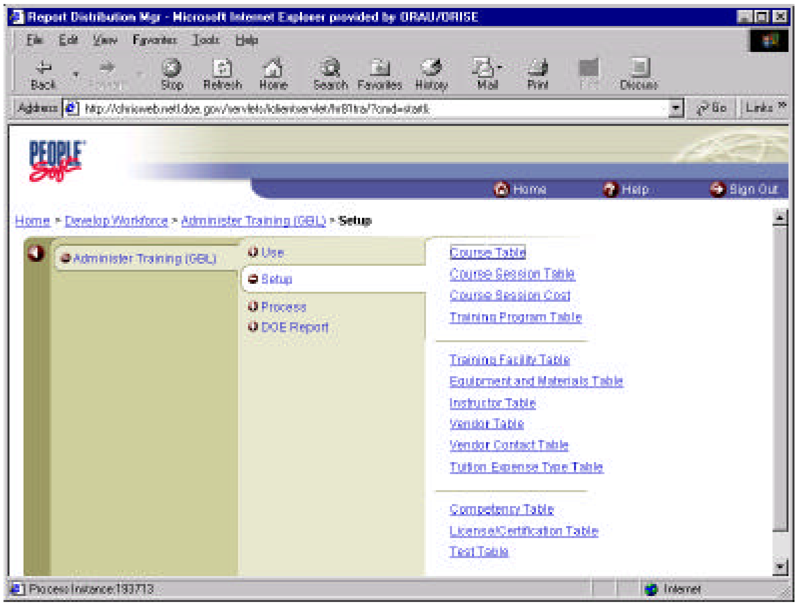
The process for running any DOE Report is essentially the same.

Updating Course Information

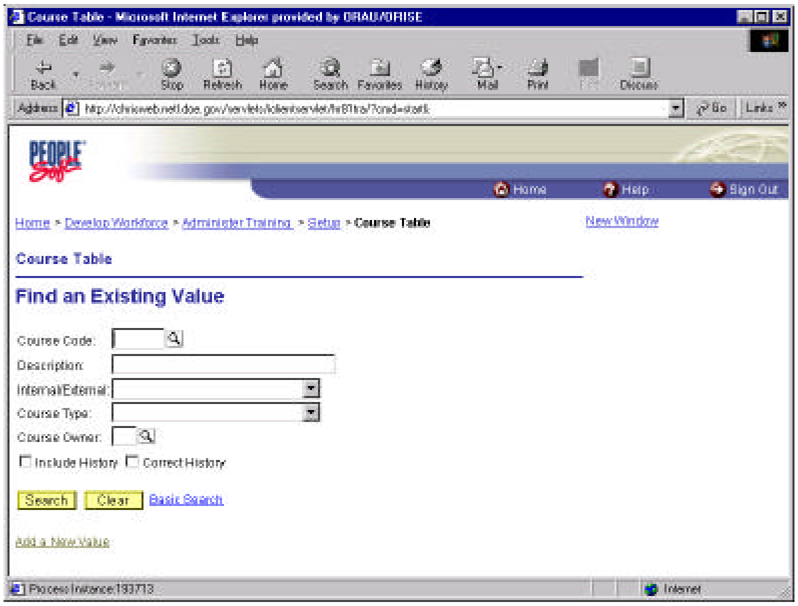
Although the courses themselves will be added to CHRIS centrally, those users with Level 2 access will be able to update certain information in the course table.

To update course information:

1. Click on "Administer Training (GBL)."
2. Click on "Setup."
3. Click on "Course Table."

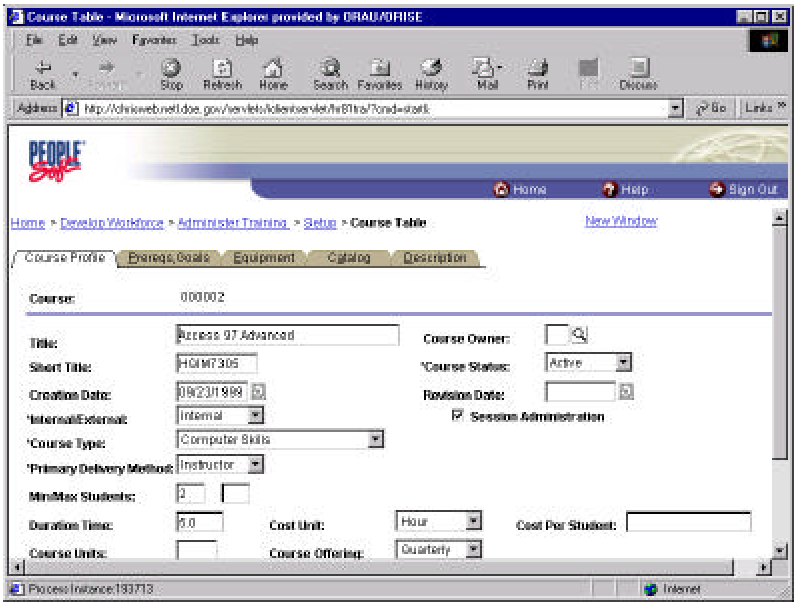


The "Course Table" "Find an Existing Value" screen is displayed.



4. Enter the course code and click on the "Search" button. (If the course code is not known, click on the "Search" button to search.)

The selected Course is displayed.



Course Revisions

BUSINESS RULE

When a revision to a course has been approved, add the revision date on the "Course Profile" screen before moving to the other course screen tabs. Only the owner of the course should update course information.

5. Update the information in the fields as necessary by clicking on the different tabs.

6. Click on the "Save" button.

Note: The creation date of the course should always show as the date it was initially entered, and it is presumed that the course is up-to-date when entered. Do not attempt to enter a revision date prior to the creation date; the system will not accept it. For example, if a course was entered into the system on September 23, 1999, that date is the creation date although the course may actually have been created much earlier. If the course was created in 1995 and revised on July 2, 1997, the system will not accept the revision date because it is before the creation date in CHRIS.